

Episode 108: The Importance of Systems

[00:00:00] Hey everyone. Welcome back to the Business Growth Advantage. I love these episodes with Liz, man. Liz Henson always does a great job of pulling the golden [00:01:00] nuggets out of both of us. And so if you're tuning into this one, buckle up because I've been hearing. Over the past week, I've been talking about this topic, and the engagements and the comments and the dms have just been, , telling me, oh my gosh, Joey, this is something you need to keep talking about because this does get talked about enough.

And it's a pretty counterintuitive, it's pretty backwards sounding, but this is for all of you business owners who maybe have been around for a while. , there is probably a big mistake that you're making that you don't even realize that you're making. Ooh, I'm like, I know where this is going, but I'm also like, where is this going?

So one of the first things that I picked up on when I started w with my business was the importance of systems. And I will forever be grateful to my mentors, , experts, people who have programs that I've purchased that have helped. Systematize [00:02:00] and, , really put processes in place around our business.

But I have to tell you that if all you're trying to do right now is optimize systems and processes, you're leaving so much room for explosive growth on the table. And you might even be shooting yourself in the foot to an extent. Mm-hmm. . So Liz, one of the reasons why I'm excited to talk to you about this is because I know that you and I are so aligned on some of these, , misses and.

Pain points that start to happen because you feel like you're being such a good business owner by focusing, on systems and processes and getting them in place, right? . , you know what just came up that we didn't even talk about before this show is that kind of reminds me of this like monetize before you make it attitude.

And I just met with an amazing friend of mine today who has fallen into being a successful me. Owner. , he has [00:03:00] no systems. But you know what he does have, he has a heck of a proof of concept because he's already literally making money with no system, with no c r m, with no nothing.

Literally just cash app, PayPal, whatever. And people can't pay him fast enough cuz he's got proof of concept. Mm. And I think we can get so sidetracked with, I need the perfect. Tool. I need the perfect system. I've gotta automate this before I get started. I know. Oh my gosh. Yeah. Yes. In my own business, I tried to automate things that, , I didn't even know what I was doing yet.

So what becomes possible if you actually just figure out what you're doing and master it before you start to atomize your system eyes. Yeah. , here's an uncomfortable but powerful question to ask yourself if you're focusing on systems, right? , are you doing it because you did the math and you realized that these are the fixes that need to be made for the business to [00:04:00] improve in the near future?

or are you hiding from the hard and uncomfortable work that you need to be doing , to validate that you've got a really strong irresistible offer that people want. Mm-hmm. and building those connections and, , having those one-to-one communications with people. Are you hiding behind these systems so that ideally you can have your business running without you having to do these things that you don't want to?

Yeah, , and I even think about, , next level c e o, cuz I was nudging you a little bit. Like Joey, let's create onboarding Joey, let's do email marketing. And you're like, Nope, we are just focusing on the offer and proof of concept and we're keeping this as simple as possible. And I was like, okay, , I get it.

I'm like, I already know it's gonna be successful though, so I feel like I'm operating from the future. But you kept me so grounded in. We don't need that. We just need to get our nine people. We don't need the fancy systems yet. Yeah. , I'm glad that you bring up that program Next Level [00:05:00] ceo. , for anybody who's not familiar, it's a,

Live program that we do once a quarter with a small group of business owners, although we plan on scaling it later this year , and mark your calendar for some time in March, we'll have dates soon. I'm gonna be doing an incredible live training series that you don't wanna miss around team building and delegating your way to multiple six and seven figures.

But next level, c e o is the program where I help business owners figure out how they can delegate more. So that their business can make more money so that they can have more time freedom and so that they can have less of that feeling of overwhelm, responsibility of having to do all of the things in their business.

And Liz is one of my amazing coaches inside the program. , I'm going to keep things confidential in terms of specifics, but a common theme, that we're seeing right now, and we work with, , pretty high level business owners who have hit major milestones of success in terms , of revenue and , the sustainability of the business that they're [00:06:00] building.

But a lot of them have focused so much of their efforts on creating strong processes. Having certain VAs or teammates helping them do certain things for the business, but they still are in the management seat. Mm-hmm. across the board on their team. So even though they have great clear systems and automations firing, and even though they have a layer of VAs helping them, they have to.

check that everything gets done right. their vacations get ruined because they find out that something's not done right. Mm-hmm. , and , the next level of success and freedom for them is building a management team, usually promoting from within so that they no longer have to be the ones who are managing all of these projects, making sure that deadlines are being met and not being the one that has to approve and check everybody's work.

Mm-hmm. . Yep. And I think, , systems are great and systems [00:07:00] are part of automating and delegating, but , there's a time piece that's important. If you try to systematize or automate something too early, you could be making changes constantly and actually creating more work for yourself.

Yeah, , there is a real cost to. Focusing on creating really great systems instead of being more boutique around the offers and solutions that you can solve. And Liz and I wanna get vulnerable about something that Indie law is working through right now. We are in the midst , of changing our email.

Software that we use, , from, , an app that we've been using for several years now, , to another one. And for anybody who's interested, drop a y or a one in the comments cuz we're working on. Once this is all done and once we've completed this transition, we're gonna do a. Debrief, video style presentation around why we made this change, what we were focusing [00:08:00] about on, why we made the change, , and our biggest lessons learned and maybe what we do differently , if you are in a similar spot where, whether it's your email management or some other type of app that you're tooling using, just isn't working for whatever reason, , and you wanna make a switch.

, and I think too, How to know when it's the right time, like how to know that this is not just , a shiny object, , thing, but , like you said in the beginning, really

being able to audit the cost and , you're so good about this now, but I love in next level, c e o, you shared that, , you used to be really into trying all the apps.

Yes. And you're like an app porter. Tell us a little bit about now where you're making these really educated. , decisions based on ROI and cost versus all the fancy tools. , Liz, I've never told you this or asked you this, but I was the guy in college and in law school as well, who spent so much time trying out all the different [00:09:00] productivity apps.

Mm. I never actually , use and implemented the app. I would just go from one to the other and I was like the ideal Apple App store customer, cuz I was just getting all of the to-do apps and the productivity apps and trying 'em all out. Oh my gosh. I tried quite a few too. Evernote. Yep. if I go really far back, , sisters would always make fun of me because I had a really big family and we always had these big family functions and usually there was some type of, like an assembly line of certain types of foods.

And so I would always go to the hamburger assembly line. Hmm. And I would meticulously grab the topics of like just designing this like really amazing burger. Then I would take a bite and I'd be, And my sisters would love it cuz they're like, Joey makes the most amazing burgers, well only takes a bite of it.

And then we get to eat the rest. [00:10:00] Now I eat all the, like I eat, you can't stop me from finishing a burger. But , the point there is , , I really like the design mode of it, of the build out and then the actual user implementation for the first time Right. Was tough. And when I started my business I was.

Always so tempted to be like, oh, there's this one feature that's missing that would be super cool. So what's some other type of tool that I could use with similar features that has this one thing that I want and I'll make the change. Hmm. And after a couple of years of that, it was very obvious that I was giving my entire team a sense of whiplash.

Mm-hmm. . So fast forward a few years and we had, been using this email management software for years and I wanna say that like it's not pretty on the inside. No. The team was okay with using it. We had systems and processes, but no one loved being inside the app. Mm-hmm. and I worked with a really [00:11:00] amazing expert who used to work for this company.

So he said, Hey, . If you wanna really build this out in a smart way, here's a way to do it with all these different bells and whistles. You can see who clicked on this link in your email, but if they didn't click this link, then they would get

tagged this way. So we had all of these complicated buildouts and it was a more expensive tool to use.

Mm-hmm. . And what we've since learned, we've gotten to a point where we're realizing that we are not yet at a place in our. Where we need that type of detail and sophistication. Yeah. Yeah. I, I remember when I first noticed that you were using like, , the bigwig email platform, I'm like, oh, Joey's like big time.

Right? And you are big time. believe me, you are. But it's really meant for like course creators almost that are like, have email lists of like 50,000 people. Yeah. Right. , I think something that, we're kind of breathing of fresh air [00:12:00] into the business right now is indie law can be automated, but it can also have a boutique experience.

you can have both as long as you stay curious and the values for your company and the customer experience that you wanna create, it can be both. I'm always asking what's light and easy, but provides the most value? And that's what this transition is about. Light and easy, but also a boutique kind of experience.

Yeah. And I wanna be clear that you can be boutiquey and still have systems and processes. Yeah, absolutely. What we are now realizing is that there are myself and others on the team who are, who have been mostly responsible for the system. Buildouts we love. , the complicated processes. We love the, here's step one B, part C mm-hmm.

Mm-hmm. kind of a thing. And we're realizing that you can still have strong systems [00:13:00] that don't need to be so granular. Mm-hmm. . , because there is

a lot of times that granularity doesn't have a payoff. Mm-hmm. and there's a real cost. To figuring out what all of those little microsteps are. If you make one little tweak, does that mean the entire process needs to get updated? Yeah. , what's the cost in terms of all of the tools that you need to make it happen?

And what's the cost of having your team constantly be building out, monitoring and auditing these complicated setups? Mm-hmm. . So a big shift for us this year is how can we simplify our processes? . I love that word boutique, Liz. So how can we give our team and our customers and clients a more boutique, hands-on experience that's supported by systems and processes?

Mm-hmm. , and how can we also create systems and processes that our team enjoys being in? Mm mm-hmm. . , I fight with some [00:14:00] people,

including my wife, a lot about how I would much rather have, my apple MacBook that keeps things simple versus , Microsoft laptop that might have certain better features, but everything is super customizable.

Yeah. And complicated. Yeah. Yeah. , you and I both have a design background too, so there's a lot to be said for things that are aesthetically Yes. Clean and simple and easy to digest. And speaking of the design note of it. . , one good example there is if you use certain tools that are super sophisticated,

that whether it's an email tool or a website tool, you have to be very careful , because of the sophistication, it could look beautiful on a desktop, but awful on a phone. Mm-hmm. . Yeah, good point. And there are really great technologies out there that might not be. Bonus Featurey. But they make it so that when you design it in general, it looks [00:15:00] good on a website and on mobile.

Yeah. And they take that thought process out of how do we make it look really good in these ninja ways for both. Yeah. Yeah. And , from like a community and marketing standpoint too, like we wanna be able to meet people where they are and nobody wants to feel like they're part of an automation, right?

Yeah. Like the key to automation is that it still feels warm and welcoming and meets our customers where they are. Yeah. And the more complex the system is, the more likely there could be a little nuance that's missed and one person no longer feels seen and heard or Yeah. like we're speaking directly to them and where they are.

Yeah. , I think we all can relate to that idea of receiving bad customer experience, right? Mm-hmm. , but also that customer experience where it's not bad, but you can tell that it's super. Yeah. And it's just not as good as it could be. It's not speaking directly to your pain point, even though you feel like you kind of signed up for the right reasons.

Yeah, and I would much [00:16:00] rather have a good process that feels automated versus a bad process. Yes. Right? Yes, absolutely. , and so , if you're working on building stuff out like that or , a new customer onboarding experience, I would much rather get systematic and perhaps automated. . Mm-hmm. . And then figure out how to make it more human and boutiquey than not really having a strong system and process for it.

Yeah, absolutely. But , before we head out, cause I know Liz and I both wanna keep this episode on the shorter end, there's something that I wanna speak to

that I, Also want to create just more content around, because I shared something recently around this topic of systems aren't enough to give you true freedom.

You also wanna be replacing yourself as manager and leader. And I got some really interesting, , response from it because , there were several people who said yes, , amen, I'm here for it and I'm not ready to hire a manager. , but I'm excited too [00:17:00] in the future. And so I just wanna do some myth busting around this idea that, , if you're at that place and you see , the value of starting to hire not just doers, but managers and maybe even department leads, that doesn't need to be a very cost-prohibitive thing or thing that will break your wallet.

Mm-hmm. . . Yeah. , you do such a good job of this at helping empower people that having teammates, delegating and automating , doesn't have to break the bank, right? Yeah. Especially if you have good systems and you can do it in-house versus hiring, , an expensive agency. Yes.

, , , I'll give two ninja tips. One is when it comes to management, an opportunity that a lot of people aren't even thinking about is how can we plan to elevate our existing doers, especially and even overseas? VAs. who you [00:18:00] ideally are already seeing quite a bit of profit off of there.

And again, I love and will always recommend ethically finding opportunities to hire overseas because it's such a win-win, , win. Mm-hmm. for you, for your business, and for the va, oftentimes, there's just so much opportunity to pay them, , a livable. For them, a thriving wage for them. That is also, , a way more profitable option.

You know, finding people who call themselves VAs here in the United States can get expensive quickly. Oh, easily. it's very expensive. so that's my one ninja tip is creating a long-term plan to elevate your overseas team. And if you don't have VAs yet, Hiring VAs with this idea in mind that you'll prove who the rock stars are over time and then elevate them.

And the other one that I just wanted to address, and man, Liz, you and I can go to town on this some later time, but finding [00:19:00] entrepreneurs Mm. who already, maybe they're already in your audience, maybe they're past clients. , maybe they're just collaborative and you, for whatever reason, you have the bandwidth and ability to bring them on part-time.

Finding part-time fractional support among your business owner, colleagues. Mm-hmm. to pay them in ways that are probably more secure than how they

might be paying themselves as business owners. Yep. And making it part-time enough to where, It might be that after you're done with the training and after they get used to what it means to manage that part of the business, it could only be five or 10 hours a month.

Yeah. For them to replace you in terms of managing that part of the business? Absolutely. I I love the whole conversation of like entrepreneur and entrepreneur cuz that's a hundred percent me and I see all of our leadership has entrepreneur qualities. Yeah. And essentially that's someone who is extremely self-disciplined [00:20:00] and self-motivated and has those.

Qualities of an entrepreneur, but also really thrives being on a team. And I learned that so late in the game that I was like, no, I really love being on teams. I feel a little bit more at home, when I'm not on an island all by myself, even if I have a team. It's not the same as being on a team.

Well, there's, knowing you and I, maybe that's something that we can work towards in the future of building our own community of entrepreneurs. Yeah. And spreading this message that it's okay. . I can see some business owners feeling like that there's a defeat in that decision of, yeah, oh no, I wanna be full-time in my own business.

I don't wanna work for someone else. and there's nothing bad period about taking on another job while you're building your business. Mm-hmm. , there is a huge difference between saying, I'm going to also add working at Starbucks. To, I'm also going to find another company that I can work [00:21:00] for, , in a higher capacity and, , and level up.

Yeah. Yes. The level up, the lightning speed at which I have learned from being under the hood in your business. . it's like I couldn't have invested in that type of education to really be in it and to be learning in that way, and my goal has always been to be in my own business as little as possible, right?

like I'm trying to scale offers that don't require as much of my energy or our tasks that my team can be doing. Yeah. So it helps. stay focused on that mission. If I have this many hours a week in this business and this many hours a week in my business, , it has helped me, , expedite some of that decision making and some of that growth.

Yeah, because I don't wanna work 40 hours in my own business. Like I just don't . Yes. , and there's a lot of stuff that I think Liz, you and I can talk about

privately to clarify stuff here, but also like, man, There's so much we can talk about and tips that we can throw out there.

if you're like, oh yeah, this [00:22:00] sounds great. One thing that I just wanna caution you about is , if you're looking to find an entrepreneur or someone who can come in , and manage, part of the business for you, , there are things out there called online business managers. Mm-hmm. . , my understanding is that is not really.

it's very expensive. Again. So an online business. and they should be, yes. They come in at a much higher level and provides support there. , this is more, , you're already as a business owner, used to managing projects that you're probably, just self-managing. Mm-hmm. . , here's an opportunity for you to manage others.

Do this in a way that will feel, and Liz, correct me if I'm wrong, but , it is way lighter to manage a team. Doing something in the business versus trying to manage yourself while you're also doing all the things. Yeah. Oh yeah, definitely. And there's already , I know our visibility department is new, but overall in your business there's systems and processes for everything.

there's so much thinking that doesn't have to be done. Yeah. Because [00:23:00] it's already there and it's already in place. It's so good. Yeah. and it's so fun. , it's not quite consulting. , it's way more permanent and part of the team than consulting, but you really elevate your leadership team to stay in those high level tasks.

And that's why it just works out for everybody. Yeah. It works out to be fractional among both of your businesses, And it allows us to always be working towards more freedom, more work-life balance. keeping us in elevated positions and out of a lot of those doer tasks. Yeah, yeah, yeah. it's so good.

It's a culture. it's not a magic wand. It is a culture to instill those values in your team of, what tasks do you wanna be doing, what do you wanna be doing more of? What do you wanna be doing less of? What type of thinking really? , inspires you. Yeah. and taking those, entrepreneurs and keeping them in those high level roles.

it's a culture cuz I'm only able to do it cause I'm watching the other leadership members do it. Hmm. [00:24:00] Right. . Yeah. And , to say what you're saying in,, maybe a little bit different language. This is top of mind for me because I saw someone share a success in a group around this. they said that they were

thinking about doing something like this for a while where they could bring on, past customers or kind of business friends to help with the company.

And they created all of these stories for themselves around, but I can't pay them as much as I would want to, as much as they're worth as much as X, Y, Z, and, . I don't want to create an offer that I myself wouldn't accept. Mm. Mm-hmm. . But part of the culture there that you spoke of, Liz, is really listening when you put those types of invitations out into the world and, hearing what other people really want right now, and giving yourself the permission to accept what they're saying as true and trusting that they're being honest with you.

Mm-hmm. because. I've seen enough times to now believe it without [00:25:00] second guessing myself that ideally the money that they receive, that our team receives from me feels lighter and easier than the money that they might be receiving elsewhere or in their own business. A hundred percent.

knowing that I am not solely providing for their entire income and part of what I am paying them and what that looks like and what the benefits are, are up to them. Mm-hmm. . Mm-hmm. and what they most want out of things. And if you're like Liz, a part of this is making an investment to, to. and get exposure to the way that this can look like so that you can do it yourself.

I know that Liz has taken so much of what she's seen and used it, tweaked it for herself, elevated her own teammates. Oh, absolutely. Absolutely. it's skyrocketed the way that I view. , growing my team and that's next level ceo, e o. But that's also, I meant to say this at the beginning of the episode too, like what makes me unique to share my insights is like, yes, I have a team of [00:26:00] my own, but being under the hood of your team and even, the experience that we had working, under the hood of James' business a little bit.

Yeah. And some of the other companies that I've helped in a consulting or fractional way. I mean, gosh, I've learned so much. about being on a team and growing a team. Yeah. Like simultaneously. Mm-hmm. . Yeah. And you've done some high level consulting as well, Yeah. You've, helped people in their businesses and you can see what works and what is inspiring you to bring back into yourself.

And you probably will also see things that you're like, oh. , this is something to watch out , for myself, or I would, do things differently. And I get to see that more confidently now. than I would if I was just brainstorming what this could look like in the future. Yep. Yeah. Exactly.

Well, Liz, I wanna respect your time. I know that you have, , some stuff to look forward to later today. , and , I'll appreciate , the half hour back as well, so we can end it there. I cannot stress enough that this. , something that business owners should be thinking about. And even if you [00:27:00] might be at a place right now in your business where you're still in that kind of hustler phase yourself, you're still trying to put those processes together.

I can't recommend enough that as you're putting more processes in place for your business, you don't go overboard with it. . Yeah. Like systems and automations are really important and we both value them so much, but you still gotta have a human being managing those systems. Absolutely. And that piece is crucial to making sure that those systems stay good over time, is that we're constantly auditing and seeing where we can improve.

So good. Yeah. All right, Liz. All right, everybody. We'll see you in a couple weeks. Yep. See you next time. Bye everyone. Bye.